

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 14 - Valley Caregiver Resource Center

From: 07/01/2011 To: 06/30/2012

## Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
Type of Activity	Q1	Q2	Q3	Q4	
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	47	21	23	13	104
Estimated Number of Attendees	67,220	6,289	455	10,578	84,542
Estimated Number of Persons Provided Enrollment Assistance	0	0	3	0	3
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	6	4	10	6	26
Estimated Number of Attendees	375	765	4,213	7,688	13,041
Estimated Number of Persons Provided Enrollment Assistance	0	0	4	2	6
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	1	1	2	4
Estimated Number of Attendees	0	13	15	55	83
Estimated Number of Persons Received Any Enrollment Assistance	0	0	0	1	1
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	0
Enrollment Assistance with Part D	0	0	0	0	0
Enrollment Assistance with LIS	0	0	0	1	1
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	1	0	0	0	1
Estimated Number of Attendees	50,000	0	0	0	50,000
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	1	0	1
Estimated Number of Attendees	0	0	11,800	0	11,800
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	6	6	4	1	17
Estimated Number of Targeted Persons Reached	2,500	1,650	11,725	25	15,900
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	55	26	36	22	139
Total Hours for Length of Activities	66.40	33.45	77.00	60.40	237.25
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
<b>Other Presenters</b>					
Total Presenters	0	0	4	0	4
Total Hours for Length of Activities	0.00	0.00	2.00	0.00	2.00
<b>Area of Focus</b>					
Dual Eligible with Mental Illness	1	1	1	1	4
Employer Termination - COBRA	0	0	0	0	0
General HICAP Information	59	32	39	22	152
Grievances / Appeals - Plan Issues	26	18	11	1	56
Long-Term Care / Insurance	2	1	2	0	5
Low Income Subsidy (LIS) / Application Assistance	41	21	23	11	96
Medicare (Parts A & B)	52	26	30	17	125
Medicare Advantage (Part C)	51	27	22	15	115
Medicare Fraud / Abuse	39	21	17	14	91
Medicare Prescription Drug Coverage (Part D)	52	28	27	14	121
Medigap / Medicare Supplements	33	16	7	3	59
Non-Medicare Fraud/Abuse	0	1	0	0	1
Other Topics / Issues (Health Specific)	0	0	3	2	5

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	1	1	2
Preventive Care Benefits	46	25	29	20	120
QMB/SLMB/QI	15	16	11	3	45
Volunteer Recruitment	7	3	12	6	28
<b>Targeted Audience</b>					
African American	24	16	18	12	70
American Indian or Native Alaskan	2	3	0	4	9
Asian Indian	1	1	2	0	4
Caucasian	34	23	28	16	101
Chinese	4	4	0	0	8
Disabled	34	20	14	14	82
Dual Eligible Groups	27	23	13	15	78
Employer Related Groups	0	2	4	2	8
Family Member/Caregiver of Beneficiary	33	17	26	13	89
Filipino	4	4	1	3	12
Guamanian or Chamorro	0	0	0	0	0
Hispanic / Latino	48	30	30	21	129
Hmong	0	4	1	3	8
Japanese	5	5	1	1	12
Korean	0	2	0	0	2
Low Income	51	26	28	17	122
Medicare Beneficiaries	53	28	35	19	135
Medicare Pre-Enrollees	27	18	22	11	78
Mental Health	0	2	2	5	9
Mental Health Professionals	3	4	1	6	14
Native Hawaiian	0	0	0	0	0
Other	0	0	1	0	1
Other Asian	3	4	2	3	12
Other Pacific Islander	1	2	0	0	3
Partnership Outreach	0	1	1	2	4
Presentations to Groups in Language Other than English	20	10	8	4	42
Rural	25	18	16	10	69
Samoan	0	0	0	0	0
Social Work Professionals	5	6	4	5	20
Some Other Race or Ethnicity	28	21	15	0	64
Vietnamese	0	0	0	0	0

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	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
<b>Literature from Events</b>					
General HICAP Brochure	1,249	777	1,101	542	3,669
"Taking Care of Tomorrow"	0	0	15	0	15
Other Publications (Created by or on Behalf of Local HICAP)	208	819	868	461	2,356
<b>Other Literature</b>					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	1	0	1	2

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

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## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	676	1,136	885	731	3,428
Total Finalized Intakes	372	386	311	419	1,488
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	196	147	176	231	750
Aging into Medicare Postacd - CDA HICAP	1	4	0	0	5
CDA HICAP	2	0	1	2	5
CHA	1	0	0	0	1
CMS/Medicare	43	50	35	60	188
Friend/Relative	14	27	11	10	62
InfoVan	1	0	0	0	1
Internet	2	0	1	0	3
Mailings	1	3	4	0	8
Media	0	2	2	1	5
Other	13	28	6	18	65
Presentations	9	7	4	2	22
Previous Contacts	89	117	71	95	372
State Website	0	0	0	0	0
Missing/Not Collected	0	1	0	0	1
<b>Mode of Client Contact</b>					
Quick Call Contacts	798	1,534	1,357	1,008	4,697
Contacts by Telephone	1,139	504	457	878	2,978
Contacts In Person at home	2	14	5	1	22
Contacts In Person at site	204	264	304	486	1,258
Contacts by E-Mail	11	18	15	20	64
Contacts by Mail/Fax	253	241	185	233	912
Total Number of Client Contacts:	2,407	2,575	2,323	2,626	9,931
<b>Contact Status Types</b>					
General info	935	918	698	949	3,500
Detailed Assistance	562	434	349	666	2,011
Problem Solving/Resolution	615	283	417	849	2,164
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	4.37	0.00	0.00	0.00	4.37
Volunteer	34.49	30.33	19.10	31.35	115.27
Paid	411.01	406.10	433.48	755.04	2,005.63
In-Kind	0.00	0.00	0.00	0.00	0.00
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	125	123	113	132	493
<b>Race</b>					
African American/Black	19	11	17	21	68

From: 07/01/2011 To: 06/30/2012

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	2	2	0	1	5
Caucasian/White	336	342	272	383	1,333
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	1	4	1	2	8
Chinese	0	4	1	1	6
Filipino	2	2	2	1	7
Japanese	5	7	4	2	18
Hmong	1	1	1	0	3
Korean	2	0	0	0	2
Vietnamese	0	3	0	2	5
Other Pacific Islander	0	0	0	0	0
Other Asian	1	2	3	2	8
Two or More Race	1	0	0	0	1
Some Other race	0	0	0	0	0
Not Collected	2	8	10	4	24
<b>Gender</b>					
Female	225	257	189	241	912
Male	146	125	121	175	567
Not Collected	1	4	1	3	9
<b>Monthly Income</b>					
Less than 150% of FPL	156	167	171	249	743
Equal To/Greater than 150% of FPL	212	203	130	159	704
Not collected	4	16	10	11	41
<b>Client Asset Limits</b>					
Below LIS Asset limit	212	171	191	272	846
At or Above LIS Asset Limit	153	191	111	123	578
Not Collected	7	24	9	24	64

From: 07/01/2011 To: 06/30/2012

## Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Total Clients that Checked Yes as Being</b>					
Veteran	24	25	12	25	86
Limited English Proficient (LEP)	49	42	54	42	187
Dual Eligible	208	135	142	254	739
Medicare Status Due to Disability	123	92	86	151	452
Dual Eligible due to Mental Disability	8	7	5	14	34
Applying/Receiving Social Security/Medicare Disability	120	85	75	138	418
<b>Age</b>					
Under 60	59	42	46	69	216
60-64	35	22	19	43	119
65-74	166	178	145	176	665
75-84	73	88	69	84	314
85+	35	52	30	44	161
Not Collected	4	4	2	3	13
<b>Marital Status</b>					
Married	149	141	118	165	573
Never Married	38	34	30	41	143
Separated	9	9	7	10	35
Divorced	84	87	75	98	344
Widowed	86	108	74	102	370
Domestic Partner	4	0	2	0	6
Not Collected	2	7	5	3	17
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	48	30	49	146	273
Estimated Dollars Saved	\$334,748.20	\$213,943.02	\$395,241.00	\$1,106,508.03	\$2,050,440.25

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	357	379	305	413	1,454
Benefit Comparisons/Explanation/Coverge Changes	282	212	158	241	893
Appeals/Grievances	6	0	2	2	10
Billings/Claims	149	74	32	22	277
Fraud/Abuse	0	1	1	0	2
Quality of Care	2	0	0	0	2
LTC/LTCI					
Enrollment/Eligibility Assistance	0	1	4	8	13
Billings/Claims	0	0	2	0	2
LTC Partnership	0	0	2	2	4
Appeal/Greivances	0	0	0	1	1
Fraud/Abuse	0	0	0	0	0
Other LTC	0	0	0	3	3
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	197	179	118	217	711
Benefit Explanation	112	130	92	162	496
Appeals/Grievances	0	0	0	0	0
Billings/Claims	75	27	2	4	108
Fraud/Abuse	0	0	0	0	0
Disenrollment/Coverage Changes	71	39	7	3	120
Quality of Care	0	0	0	1	1
Plan Comparison	79	90	70	131	370
Marketing/Sales Complaints/Issues	1	0	1	0	2
Plan Non Renewal	0	7	0	0	7
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	229	274	217	339	1,059
Benefit Explanation	153	204	141	227	725
Appeals/Grievances	0	0	2	1	3
Billings/Claims	90	49	13	12	164
Fraud/Abuse	0	0	0	0	0
Coverage Changes/Disenrollment	87	67	25	11	190
Plan Non Renewal	0	46	15	4	65
Plan Comparison	89	168	108	184	549
Enrollment/Enrollment Asistance	8	20	22	20	70
Quality of Care	2	2	0	3	7
Marketing/Sales Complaints or Issues	3	3	2	0	8
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	162	178	159	185	684
Medi-Cal Application Assistance	0	0	2	2	4



From: 07/01/2011 To: 06/30/2012

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	39	47	62	88	236
MSP Application Assistance	1	2	4	1	8
Medi-Cal/QMB Claims	32	13	4	11	60
Fraud/Abuse	0	0	0	0	0
Other	88	39	52	171	350
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	56	34	21	34	145
Military Benefits	18	15	12	10	55
COBRA	15	3	6	4	28
Mental Health Topics	2	1	3	7	13
Fraud/Abuse	0	0	0	0	0
Other Health Insurance	3	2	7	50	62
Other	49	18	24	104	195
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	228	258	184	269	939
Eligibility/Screening	274	340	283	386	1,283
Plan Comparison	103	198	151	214	666
Enrollment/Anrollment Assistance	92	62	50	59	263
Billings/Claims	70	12	6	7	95
Coverage Changes	103	69	18	5	195
Re-enrollment	3	1	1	0	5
Disenrollment	4	2	3	2	11
TROOP	0	0	0	0	0
Other	0	2	0	2	4
<b>LIS / Extra Help</b>					
Eligibility / Screening	342	356	301	399	1,398
Benefit Explanation	53	59	55	41	208
Application Assistance	23	35	40	20	118
Claims/Billings	19	12	11	4	46
Appeals / Grievances	0	0	1	0	1
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	25	20	11	15	71
PPARx	6	7	0	6	19
Military Drug Benefit	7	12	7	6	32
Manufacturer Program	6	5	0	5	16
Other	2	1	3	5	11
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	9	16	9	47	81
Lag Time	0	0	0	0	0
Multiple Enrollment	0	0	0	0	0
Poor Training of Agents	1	0	0	0	1
Poor Training of CSR	1	0	0	0	1

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	Topics/Needs Discussed				TOTAL
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	3	0	0	0	3
Agent fraud/abuse	1	0	0	0	1
Formulary problems/changes	1	2	0	1	4
Dosage problem	1	0	0	0	1
Data problems	1	1	1	2	5
Delay in medications	4	0	1	3	8
Incorrect Co-Pay/Can't Afford Co-Pay	1	0	0	0	1
Client reached donut hole	2	1	0	1	4
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	0	0	0	2	2
Quality of Care	3	4	0	28	35
Plan Non Renewal	0	0	1	0	1
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

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### Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	<b>0</b>
CMS:	1	0	0	0	<b>1</b>
Part D Plan:	3	0	0	1	<b>4</b>
SMP:	0	0	0	0	<b>0</b>
Urgent Fax:	1	0	0	0	<b>1</b>
800 Medicare:	3	0	0	0	<b>3</b>
Other:	0	0	3	2	<b>5</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>8</b>	<b>0</b>	<b>3</b>	<b>3</b>	<b>14</b>
<b>All Other Complaints</b>					
APS :	0	0	0	0	<b>0</b>
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	1	0	<b>1</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	0	0	0	0	<b>0</b>
Other:	0	0	0	0	<b>0</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	13	3	4	14	<b>34</b>
Total duration of calls	4.13	0.36	0.38	2.37	<b>7.24</b>